Nintex Workflow 2010 & 2013

COURSE OVERVIEW

Duration: 3 days

Note: This release of Nintex Workflow 2013 contains the same functionality as Nintex Workflow 2010, therefore the content in this course is relevant to those that wish to learn Nintex Workflow 2013 or Nintex Workflow 2010.

This first 3 day of this course covers everything you need to know to install and use Nintex Workflow 2010 and 2013, whether you are new to the product or already have some experience this course has something for everyone.

The course starts with an overview of the product, giving insight into potential uses, followed by an installation module to familiarise you with how the product works behind the scenes.

The rest of the course is dedicated to learning how to build and manage workflows, starting small with simple approval workflows but soon growing in sophistication as the workflows grow and you learn how to work with a variety of techniques including serial approval, loops, variables, database connections, error handling and state machines.

This course will suit a varied audience from developers to sales people.

Nintex Workflow exists to allow workflow creation and management without the need for programming, this sets the tone for the course with no programming required during any of the topics.

Prerequisites

This course is a demanding three days aimed at delegates that are already experienced users of SharePoint. No prior knowledge of Nintex Workflow is needed but some previous experience of Nintex Workflow would be an advantage. It would also be an advantage if you have experience of creating workflows in Microsoft SharePoint Designer or Visual Studio.

The content of the Workflow section of this course covers the following topics:

- _Installation and configuration of Nintex Workflow - upgrade issues etc._
- _Workflow fundamentals and Introducing Nintex Workflow designer, Rich Workflow designs_
- _using Nintex Workflow designer, Advanced Workflow Design capabilities with Nintex_
- _Workflow, Creating State Machine workflows with Nintex Workflow._
- _The Modules include the following topics._

Introduction to Nintex Workflow

- Overview of Nintex Workflow
- Workflow logic – defining workflow
- Nintex Workflow and SharePoint
- Nintex Web Site and Support

Installation and Configuration

- Product versions and features
- Installation requirements and setup
- Central Administration Configuration
- Upgrading

Getting Started with Nintex Workflow

- Activating Nintex Workflow Site Features
- Introducing the Nintex Workflow designer
- Create a workflow
- Managing the Workflows
- Working with Templates
- Managing Site level Settings

Creating Rich Workflows

- Conditions and Action Sets
- Working with Snippets
- Using Workflow Variables
- Rich Workflow Actions

Advanced Workflows

- Working with Publishing Actions
- Provisioning Active Directory Object
- Managing Audiences and Profiles
- Enterprise Integration
- Enterprise Reporting

State Machine Workflows

- The State Machine Action
- Building a simple State Machine workflow

User Interface

- Click less and do more
- The Ribbon
- Zoom and Print
- Association Columns
- Workflow Approval

User Defined Actions

- User Defined actions overview
- Creating User Defined actions without programming

Reusable Workflows

- *Creating Reusable workflows*
- *Site workflows*

Further Workflow Actions

- *Store data and Retrieve data actions*
- *Capture document set version*
- *Delete previous versions*
- *Delete drafts*
- *Delete multiple items*
- *Convert document*
- *Create item in another site*
- *Update CRM record*
- *Delete/Disable CRM record*
- *Query CRM*
- *Read document*
- *Send document set to repository*
- *Submit record*
- *Declare as record*
- *Undeclare as record*
- *Update document*
- *Wait for check out status change*

- *Get meeting suggestion*